Utah Highway Safety Office
GEARS System

Applicant User Guide
Version 1.0

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1. System Requirements

Utah GEARS was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

1.a. Operating System

UT GEARS was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

UT GEARS is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing UT GEARS, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

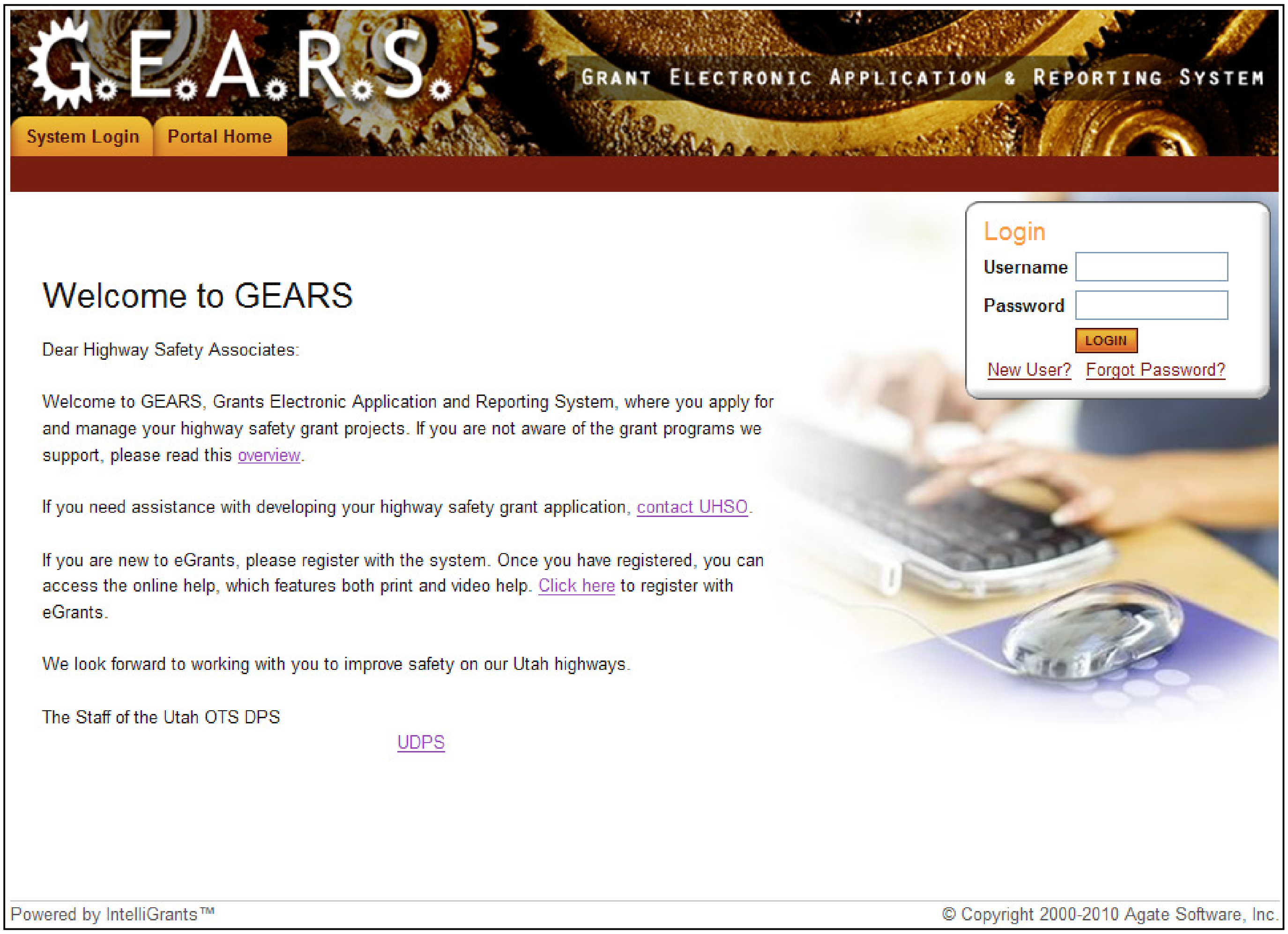
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to Adobe and download Acrobat Reader free.

2. Utah GEARS System Homepage

To access UT GEARS, type "www.UtahGEARS.com" or "www.UtahGEARS.org" into the address bar of your web browser and press "Enter." The page you see should look like the image shown below.



3. Applicant user types

There are three security roles defined for UT GEARS users: Project Director, Financial Officer, and Subgrantee Staff. These roles have different security access to work on the applications. Once the Project Director is identified and their new user accounts created, the Project Director will select and enter their own organization’s staff names to access UT GEARS. The organization’s staff entered by the Project Director will be assigned to either the Financial Officer or Subgrantee Staff security level role. Each security role is summarized below:

Project Director will be able to:

- Add, edit, and delete user account information for Project Director, Financial Officer, and Subgrantee Staff
- Initiate available grants
- Enter, update, and delete information on applications
- Download and attach files to the application
- Cancel an entire application before submission
- Submit applications to UT GEARS
- Modify applications within the status of Modifications Required
- Check on the status of each application

Financial Officer will be able to:

- Edit and delete user account information for Financial Officer and Subgrantee Staff
- Enter, update, and delete information on applications
- Download and attach files to the applications
- Modify applications with status of Modifications Required
- Check on the status of applications

Subgrantee Staff will be able to:

- Edit and delete user account information for Subgrantee Staff
- Enter, update, and delete information on applications
- Download and attach files to the application
- Modify applications with status of Modifications Required
- Check on the status of each application

Security Roles	Control Access to Organization	Control Access to Grant	Read	Write	Initiate Grant	Submit Grant	Cancel Grant
Project Director	X	X	X	X	X	X	X
Financial Officer			X	X			
Subgrantee Staff			X	X			

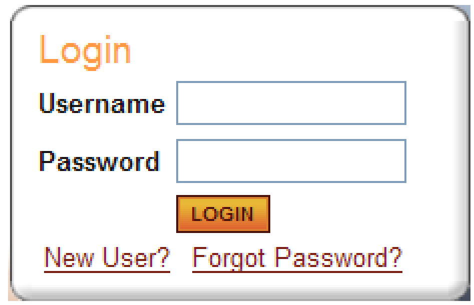
4. Gaining access to UT GEARS

In order to use the system you must be granted access. If you are:

- The Project Director, you must request access and obtain approval from the UT GEARS system administrator (see section 4a)
- The Financial Officer or Subgrantee Staff must request access through your agency's Project Director (see section 4b)

4.a. Gaining access through a system administrator

The first time a Project Director comes to UT GEARS, they must create a new user account.



To create a new user account:

1) From the UT GEARS homepage click the "New User?" link located in the "Login" section.

2) Complete the user form.

   a) Fill in all information as required. All items marked with an '*' are required to create your account.

   b) The "Username" field must consist of only letters and numbers, 5 to 20 characters long.

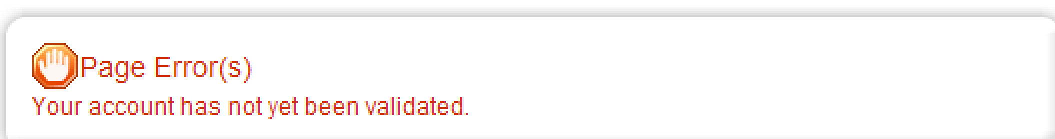
   c) The "Password" field must consist of only letters and numbers, 7 to 20 characters long.

   d) The fields "Password" and "Confirm Password" must be the same.

   e) The person who is to be the Project Director for the Organization completes the page, including Organization and title.

NOTE: Once the Project Director has created a user account and gained access to the system, they will never have to request access again.

Having saved your contact information, your account must then be approved by an administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:



When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated.

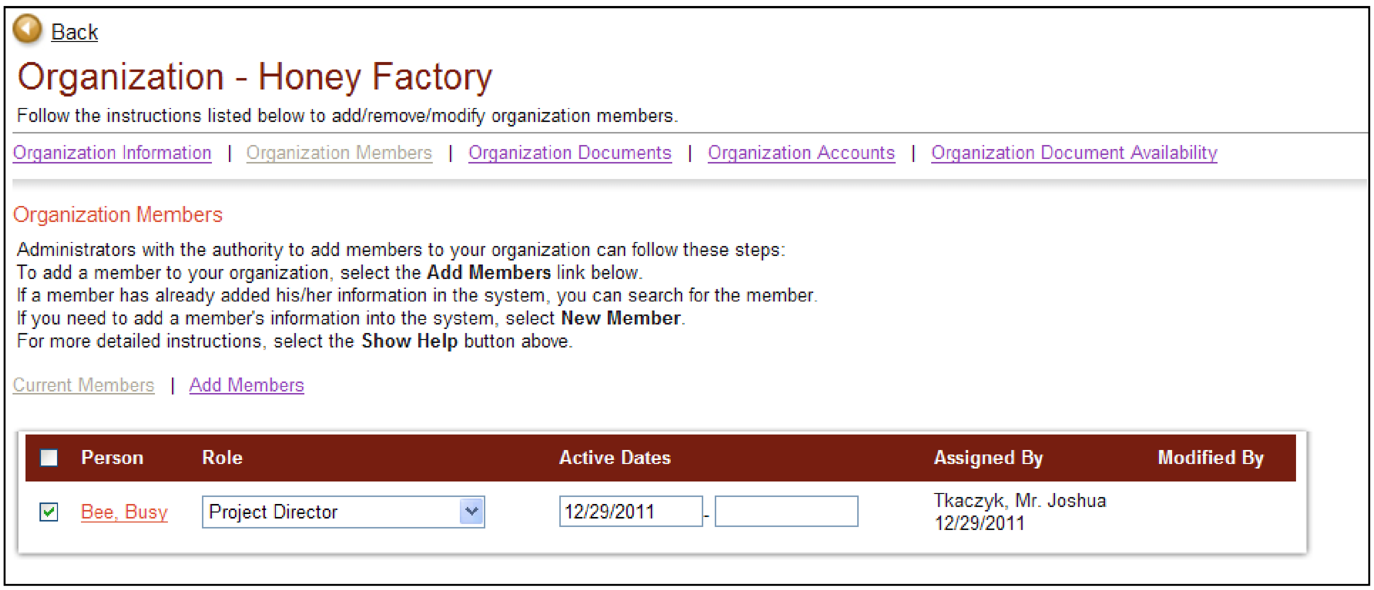
4.b. Gaining access through another in your organization

1) The Project Director must first login to the system.

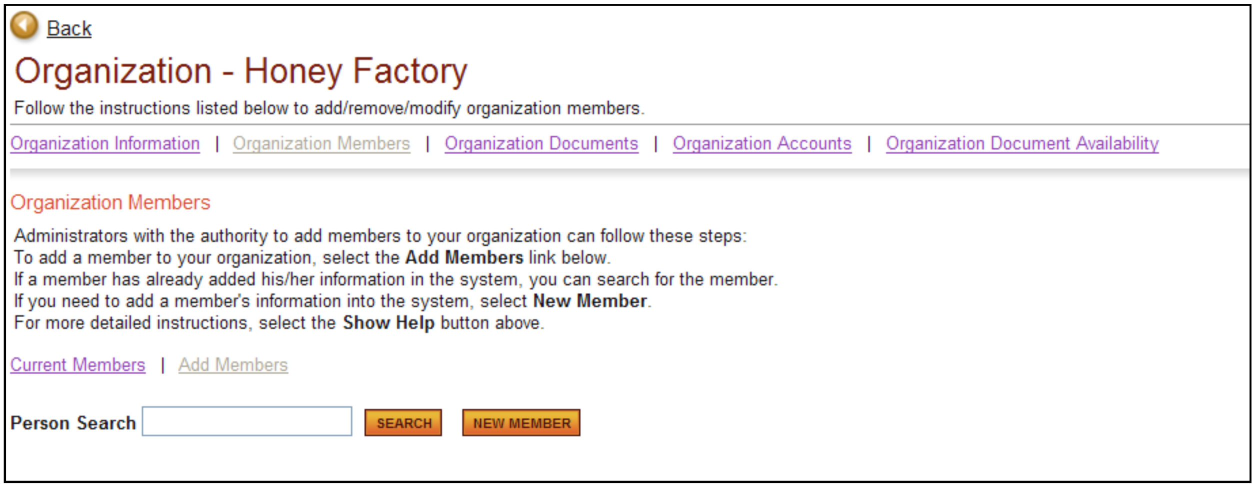
2) From the Main Menu the Organization's Project Director must then click the My Organization(s) link on the menu bar.

3) Click the name of the organization you would like to add this new user to. (Some Project Directors may be members of multiple organizations. Each organization would be listed here. Simply click the name of the organization you wish to add this new user to.)

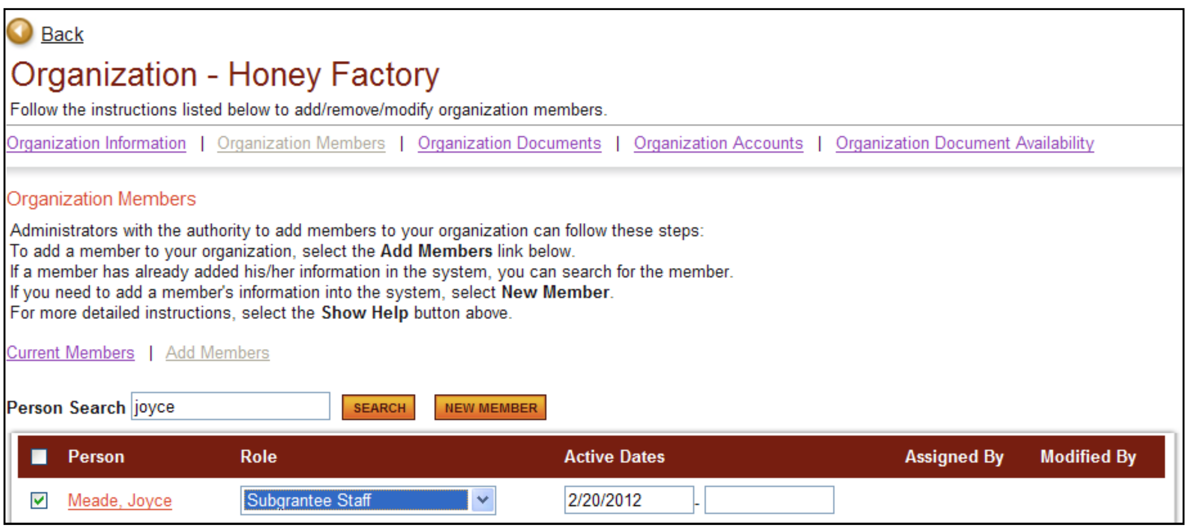
4) You are now on the Organization page. Click the "Organization Members" link above the Organization Information section. Click the Add Members tab above the Organization Members list. By default the "Current Members" tab will be active and below it will be listed the various members of the Organization. If the person whose account must be added is not shown, click the "Add Members" link.



5) After clicking the "Add Members" tab, the Project Director should first search for the person that he or she wishes to add by typing in part of the user's name into the "Person Search" box and then by clicking the "Search" button.



6) If the user exists he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role and a start date within the agency. Finally, the "Save" button must be clicked in order to add the user.



7) If no users were found that matched the search criteria:

   a) Click the "New Member" button.

   b) Enter the basic demographic information for the user that requires an account.

   c) Click the "Save & Add To Organization" button.

   If a user is added to the system but not linked to an organization, search for the new user and link them to the organization following the directions above.

   NOTE: Users not linked to an organization cannot access any grant information.

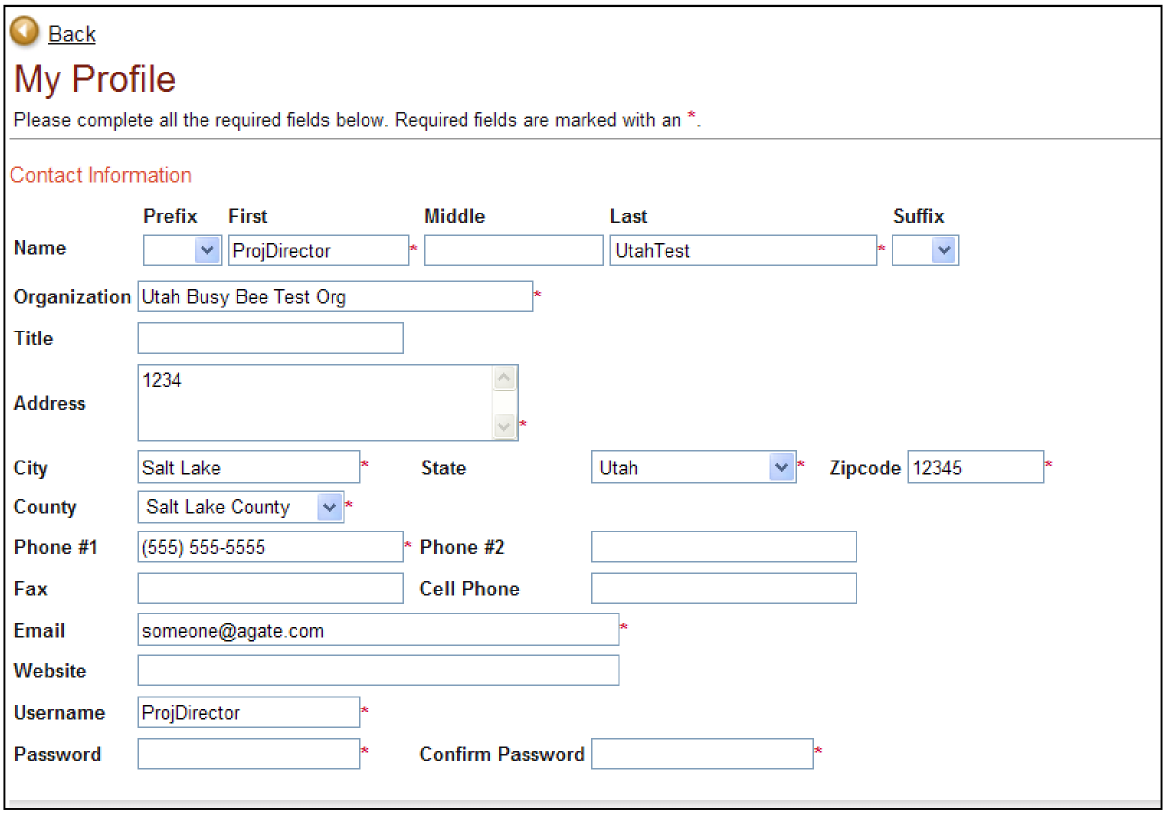
5. Keeping contact information current

In order to receive continued funding or to enter into new grant agreements, it is important that your contact information be as up-to-date as possible. This is done very quickly and easily in UT GEARS. By keeping your user record and agency record current with all of the latest changes, UT GEARS staff will be able to contact you appropriately when the need arises.

5.a. Updating your user record

You may update your user record at any time by following these steps:

1) Click the "My Profile" link on the menu bar on the Main Menu.

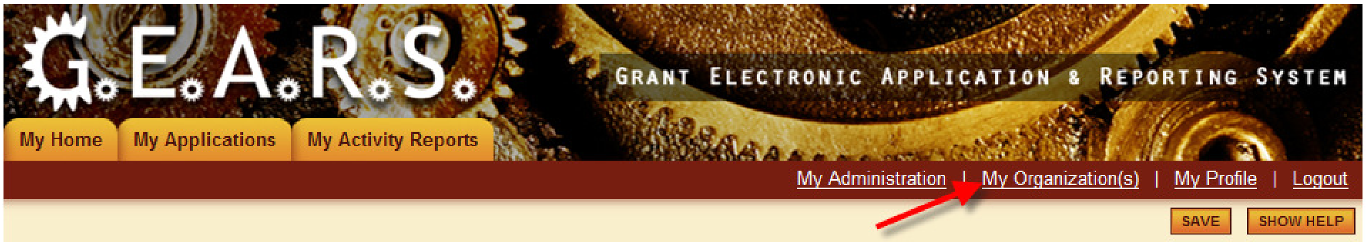


2) Update the form accordingly and click the "Save" button.

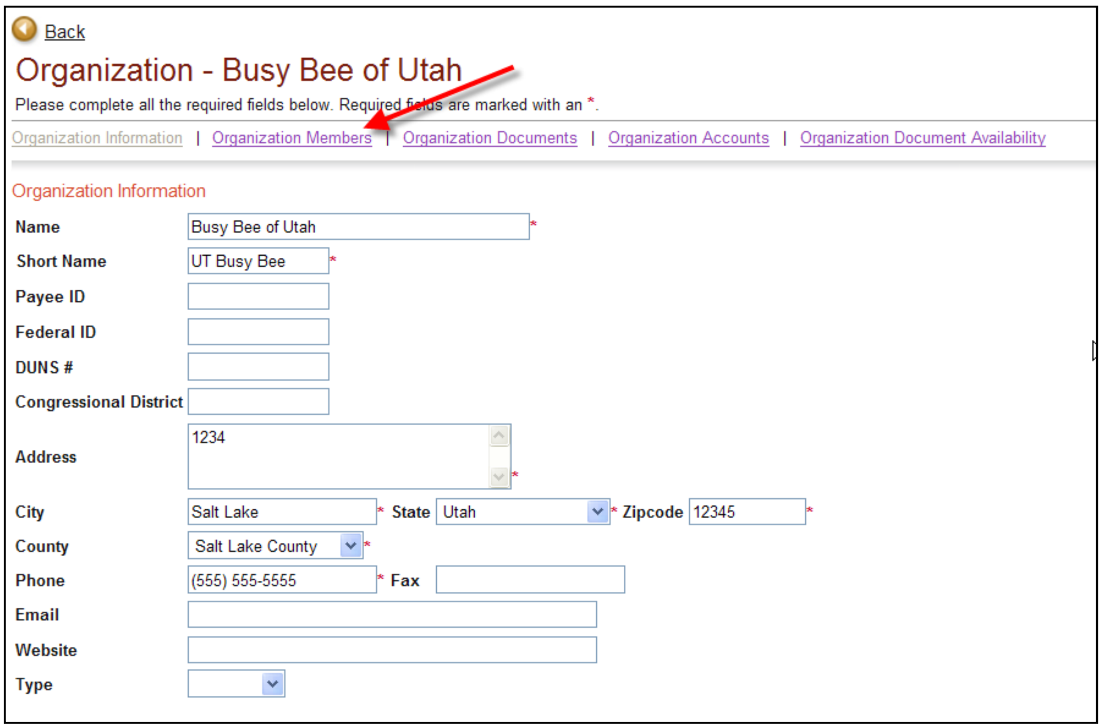
5.b. Updating another user's contact record

If you are the Project Director for your organization you may edit the contact information for others in your organization by following these steps:

1) Click on the "My Organization" link on the menu bar and then click on the organization whose member you would like to edit. Click on the "Organization Members" link.



2) Click on the "Organization Members" link at the top of the page.



3) Click the name of the person whose contact information you want to change.

4) Update the form accordingly and click the "Save" button.

NOTE: A Project Director may not change the contact information of another Project Director. If a Project Director were to click on another Project Director's name, they would receive an email prompt instead of seeing their contact information.

5.c. Updating the information for your agency

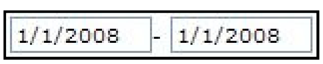
Although it doesn't occur frequently, when your organization's contact information changes it is important to update that information in the system by following these steps:

1) Click the "My Organization" link on the menu bar.
2) Click on the Organization that you would like to edit.
3) Update the form accordingly and click the "Save" button.

5.d. Deactivating a user in the Organization

A Project Director from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit application related information for your organization. You may deactivate a member of your organization by following these steps:

1) Click the "My Organization" link on the menu bar.
2) Click the name of the organization whose member you would like to deactivate.
3) Click on the Organization Members tab.
4) Change the second active date in the system to a date in the past for the user requiring deactivation and then click the "Save" button.



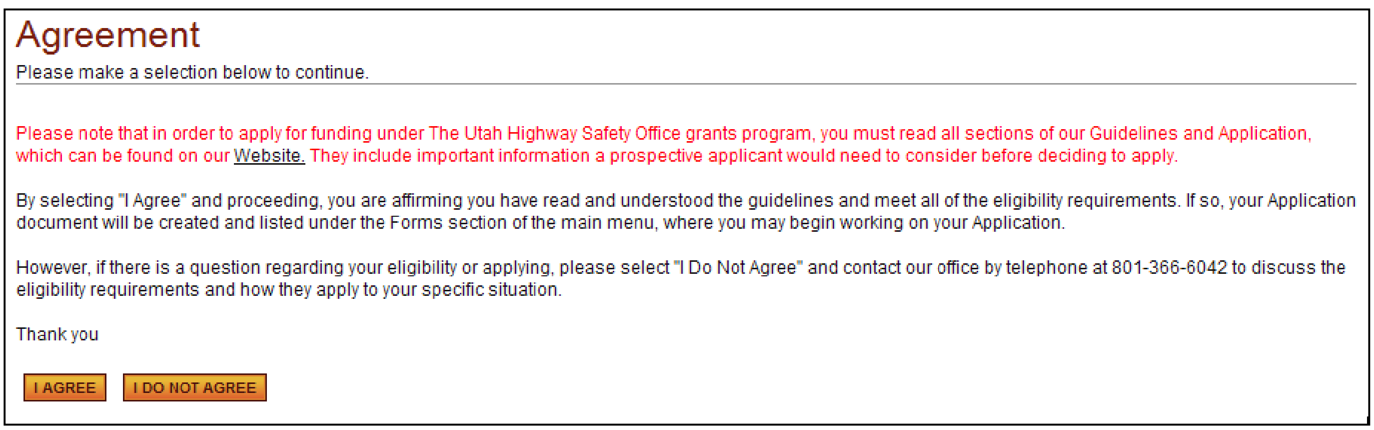
6. Initiate an Application

The Project Director security role is permitted to initiate applications. In order to create an application, please follow these steps:

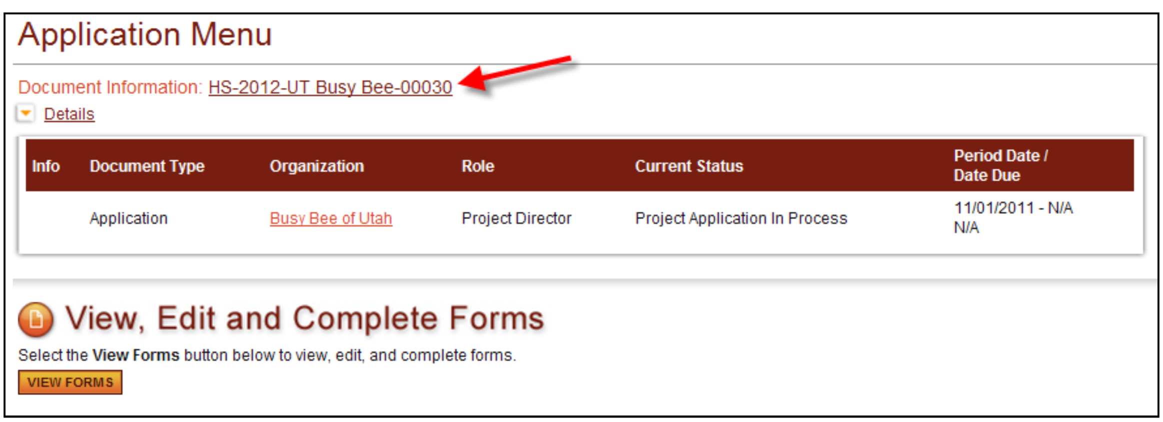
From the Main Menu, click the "View Opportunities" button under the "View Available Opportunities" section on the main menu. This section will show you all of the grant program types where you may apply for a new grant.

For those grant programs where you are eligible to submit a new application you will see a "Apply Now" button under the description of the grant. Click the "Apply Now" button.

A confirmation page will appear asking for confirmation. You must read the Guidelines and Application and by clicking the "I Agree" button you accept those conditions. An application will be created and you will be taken to the "Application Menu" where you can begin filling out the pages.



The document information will be displayed at the top of the Application Menu.



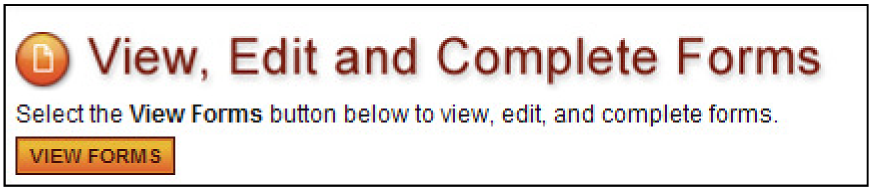
Following the creation of an application, a new task for that program will be under the "View My Tasks" section on the main menu. All applications for your organization will be shown under the "View My Tasks" section. When logging into UT GEARS, click the "Open My Tasks" button to return to any application initiated by your organization.

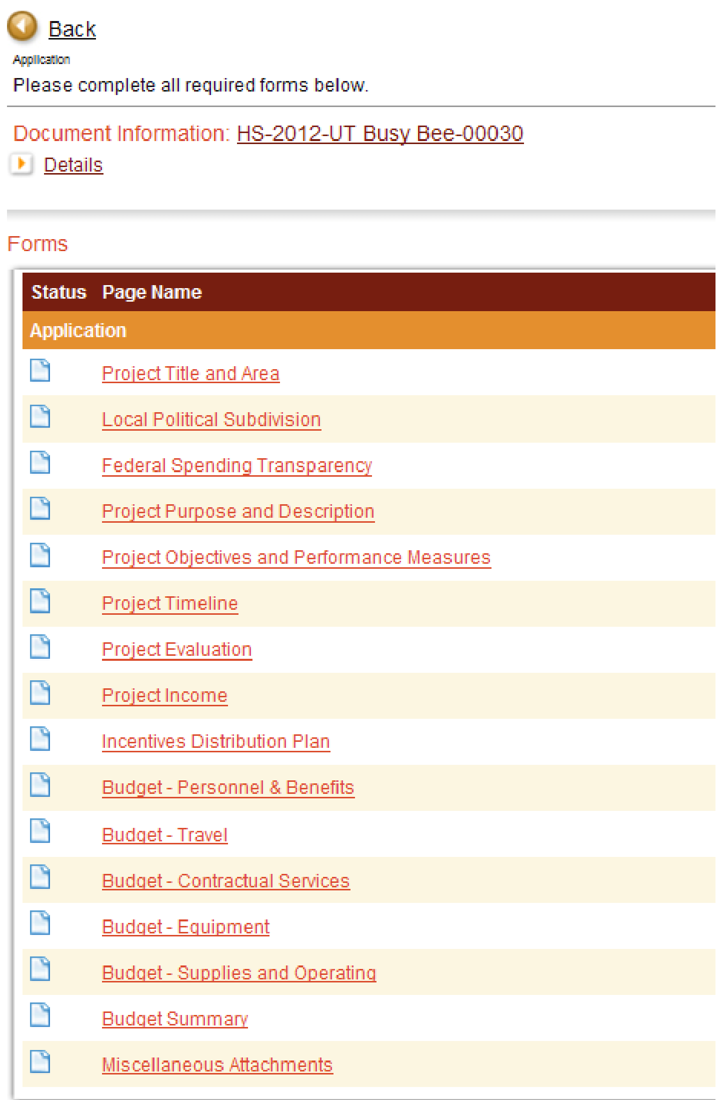
7. The Application Menu

The Application Menu is organized into various sections that help to organize the tasks and information. These sections are described below.

7.a. View, Edit and Complete Forms

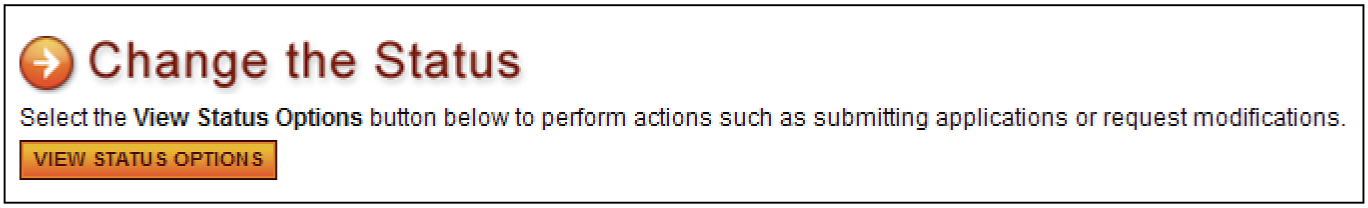
The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms to be completed prior to the application being submitted. To edit application forms simply click "View Forms" and then click on the name of the form you wish to edit.

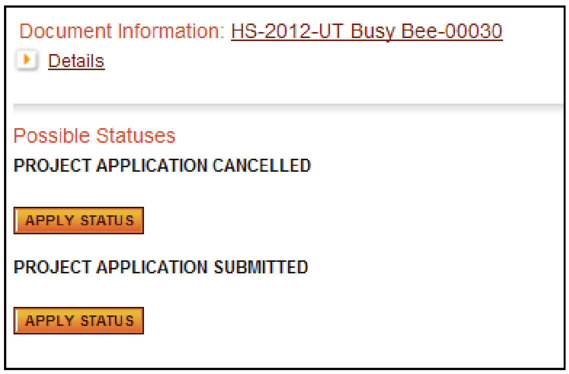




7.b. Change the Status

The "Change the Status" section allows an Project Director the ability to submit applications or push the application to the next status level. Click the "View Status Options" button to see what status push options you currently have available to you.





7.c. Management Tools Section

The Management Tools section allows certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application. Tools are available based on the security role of the person logged in.

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

Management Tools

CREATE FULL PRINT VERSION
Select the link above to create a printable version of the document.

CREATE FULL BLANK PRINT VERSION
Select the link above to create a blank printable version of the document.

ADD/EDIT ORGANIZATIONS
Select the link above to manage the organizations associated with this document.

ADD/EDIT PEOPLE
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

MY ACTIVITIES SEARCH/REPORTS
Select the link above to perform a search and output the results from the My Activities.

STATUS HISTORY
Select the link above to view the status history of this document.

CHECK FOR ERRORS
Select the link above to check the entire document for errors.

PROCESS FLOW SNAPSHOT
Select the link above to view the details of the current and next possible status for this document.

DATE MODIFICATION
Select the link above to change the dates associated with this document such as its due date.

ACCOUNT TRANSACTIONS
Select the link above to perform financial transactions with in the system on this document.

VIEW MODIFICATION HISTORY
Select the link above to view various modifications that people have made to specific pages in the document.

MANAGE REVIEW PROCESS
Select the link above to view review information for the document.

ATTACHMENT REPOSITORY
Select the link above to view all attachments in this document.

7.d. Related Items

The Related Items section is where you will find items that are related to an application or grant. An example of a related item would be an Activity Report or an Invoice. It is likely you will not have any related items until later in the grant cycle.

8. Assigning Users to an application

The Project Director has administrative rights to add or remove Financial Officers and Subgrantee Staff to/from applications. The Financial Officer may add other Financial Officers and Subgrantee Staff. Users with the Subgrantee Staff security role may add additional Subgrantee Staff.

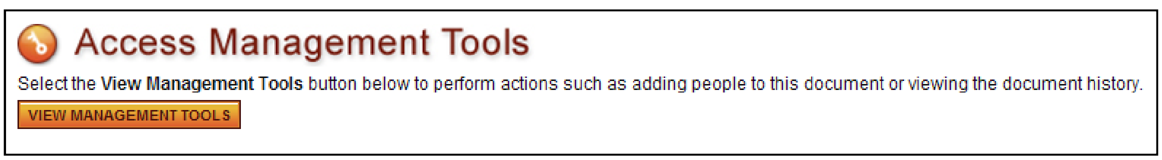
Members of consulting firms are commonly added to applications by the Project Director as Subgrantee Staff. The role assigned to a consultant is decided by the Project Director of the organization filling out the application. It is recommended that consultants be given the Subgrantee Staff security role, but this is not a requirement.

Any Project Director, Financial Officer, or Subgrantee Staff that is a member of the organization that is applying for a grant will automatically be added to that application when the application is first created. Any Project Director, Financial Officer, or Subgrantee Staff member who is added to the application will also be automatically added to all corresponding Progress Reports and Claims when each is created. New users to UT GEARS will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

8.a. Assign User Access to Application

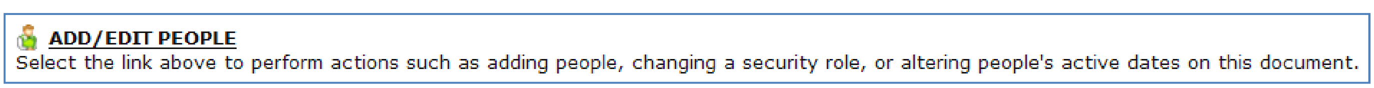
1) To add users to an application, click on the application of choice in the "My Tasks" Section on the Main Menu.

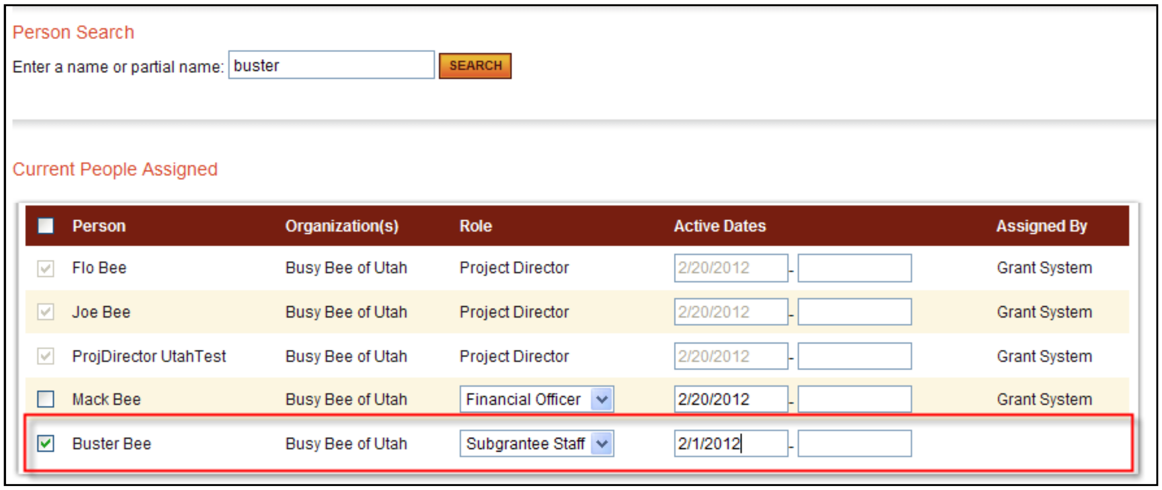
2) Click the "View Management Tools" button and choose the Add/Edit People link.



3) Type in the name of the individual in the search criteria box and click the "Search" button.

4) From the search results, select the person, give him/her a security role and fill in the access date you would like this individual to access the application.

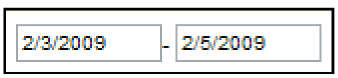




8.b. Remove User Access to Application

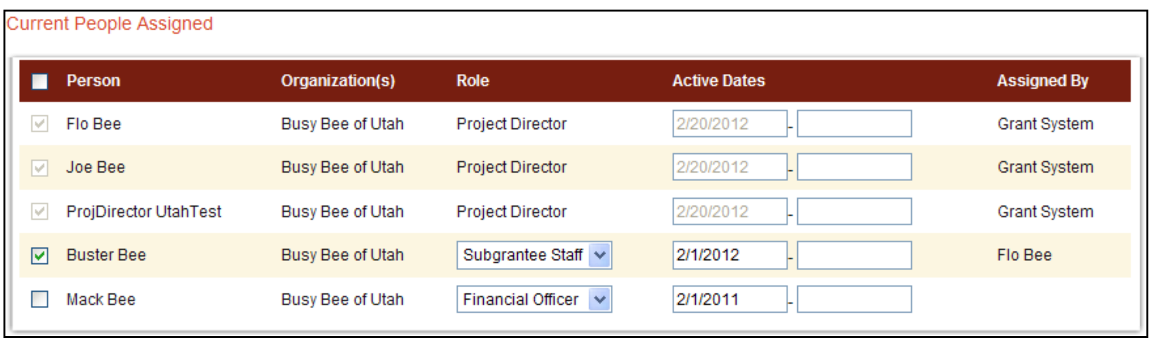
There are two ways to remove a user's access to an application. To remove a user's access to an application, on the application menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

1) Edit the access start and/or end date for the user.



Or

2) For the desired user, in the "Selected" column, disable (uncheck) and save the page. The user will be removed from the application.



9. Application Form Completion

If you click on the "View Forms" button under "View, Edit and Complete Forms" on the Application Menu, the various pages of the application are displayed. These are the forms that must be completed before your application can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

9.a. Forms Navigation

There are three basic methods for navigating through the forms of your application. You may either use the "Back" link at the top of any page within the application, the "You are here" links just below the "Back" link or you may use the links listed in the Related Pages section at the bottom of the page.

By clicking the "Back" button, you will be taken back to the Forms menu and you can click on the next page you wish to complete. You do not have to complete the pages of the application in any particular order.

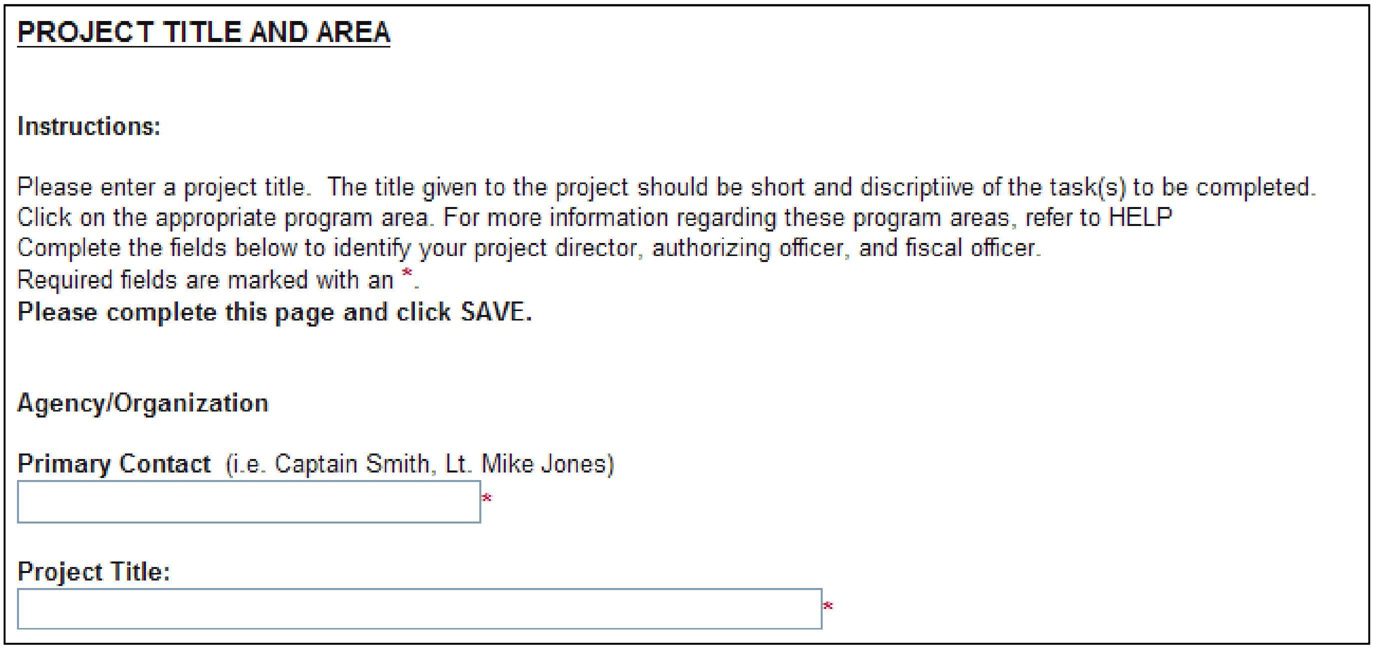
The "Navigation Links" can be found at the bottom of the page. To access another page, click on the page name.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Project Title and Area			
	Local Political Subdivision			
	Federal Spending Transparency			
	Project Purpose and Description			
	Project Objectives and Performance Measures			
	Project Timeline			

9.b. Form Completion

When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields.


PROJECT TITLE AND AREA

Instructions:

Please enter a project title. The title given to the project should be short and discriptiive of the task(s) to be completed.
Click on the appropriate program area. For more information regarding these program areas, refer to HELP
Complete the fields below to identify your project director, authorizing officer, and fiscal officer.
Required fields are marked with an *.
Please complete this page and click SAVE.

Agency/Organization

Primary Contact (i.e. Captain Smith, Lt. Mike Jones)
*

Project Title:
*

In the creation of some forms the "Add" button is used to create additional forms. Any form that has an "Add" button allows you to have multiple instances of that form. The following picture shows the available "Add" button on a page that multiple pages can be created.

When multiple pages have been created for this particular form, you can choose between them. A dropdown will appear on the far right of the button toolbar.

When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of pages connected with the particular link.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Performance Measures			
	Other Activities			
	Enforcement Report (2)		UtahTest, ProjDirector 2/20/2012 12:17:51 PM	

9.c. Automatic Calculations

When possible, UT GEARS will automatically perform calculations.

BUDGET - TRAVEL

Instructions:

If your application includes Travel, please complete this page and click SAVE. Fields will populate with information and any errors will be noted at this point.
Once saved, more rows will be available for adding travel.
For additional information, refer to HELP

Description of Anticipated Travel	Federal Share	State/Local (Your) Share	Total
	$25	$30	$55
			$0
			$0
Total	$25	$30	$55
Application Running Total	$1,966	$677	$2,643

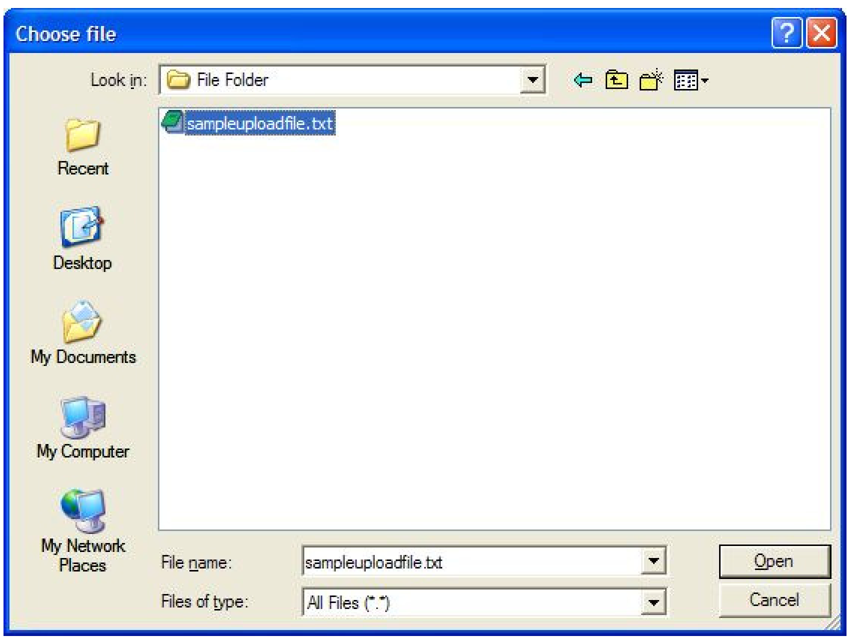
9.d. Error Messages

If any required field is not completed within an application form or there are business rules violated, an error message will be displayed in red across the top of the page immediately after the Save button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain and you attempt to submit the application, you will receive an error and UT GEARS will require the errors to be fixed before the application submission is completed. See the example below.

9.e. Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads; doc, eps, pdf, jpg, gif, bmp, txt, avi, wmv, ppt, xls, mov, dpi, png, and mp3. To upload, click the “Browse” button.

Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.



After the page reloads, you must then click the page “Save” button to save the uploaded file.

9.f. PDF Version

In many pages a "Print Version" button will be available that will automatically create a PDF for you with the data that you provided for each form. These dynamic PDF's can be printed, or saved to your computer for reference. It is a good practice to review the PDF files for accuracy prior to submitting the application electronically.

9.g. Copy and Paste

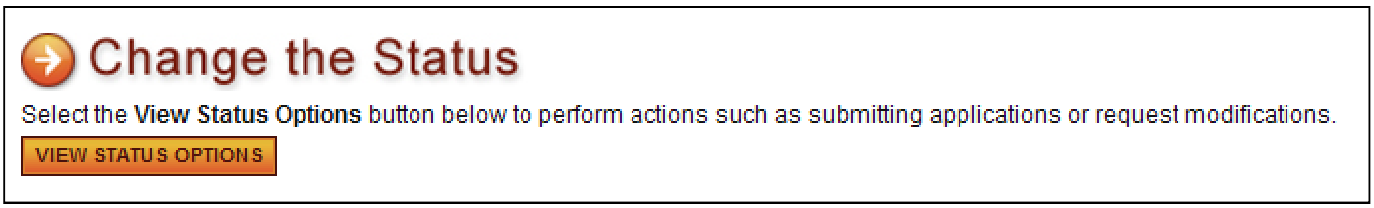
Applicants should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within UT GEARS. UT GEARS will <u>not</u> recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs. Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box. Applicants may want to first copy and paste text into any standard "notepad" (or equivalent) program, which will have similar formatting to the text boxes in UT GEARS.

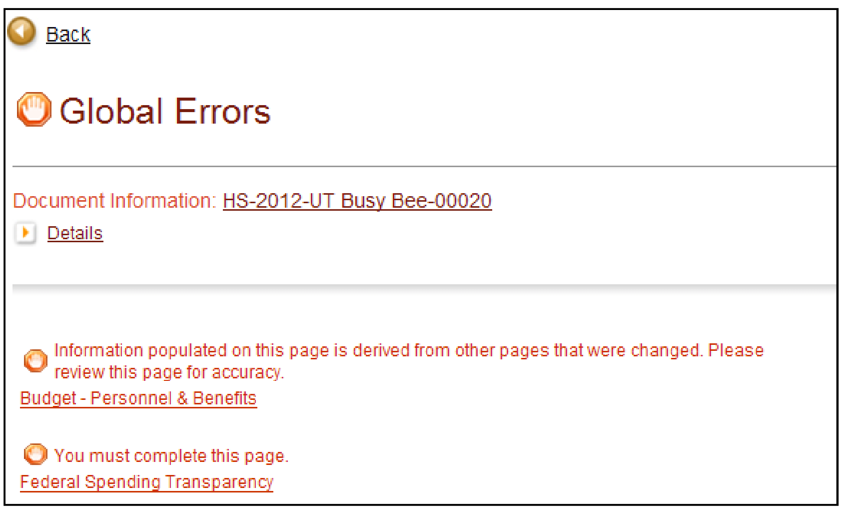
10. Submitting your Application

The Project Director security role is the only role authorized to submit an Application. When the application is believed to be complete and no more changes are required, the Project Directors may choose to submit.

It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!

To submit, the Project Director must click the "View Status Options" button under the "Change the Status" header on the "Application Menu." A list of the possible status changes will be shown on this page. Simply click the "Apply Status" button under the appropriate status change. If any errors exist on any of the application's forms when the Project Director attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before UT GEARS will allow an application to be submitted. If no errors exist, the Project Director will be prompted to confirm his or her decision.





11. Notes

UT GEARS allows for application forms to have notes attached to them. These notes may be used to communicate to other organization staff members or to UT GEARS staff who are assigned to the application.

11.a. Adding and Editing Notes

1) Click on the “Add Note” or “Show Notes” button.

2) Any existing notes will be shown at the top of the new window.

   a) Each note has the following information: message name, author, date, and action.

   b) By clicking on the message name, the note will expand showing the entire note’s message.

   c) By clicking on either edit or reply under the action column, a note may either be edited (by the user who created the note) or replied (by another user).

3) To add a new note:

   a) Click Add a New Note, type in the subject, message, and check the user(s) the note is meant for and click save.

4) Click the “Close Notes” button to close the notes Window.

It is important to remember that the author of the notes has the ability to determine who can and cannot see their note. Notes are an informal method of communication. Any text entered into a note will not be displayed on a PDF and will not be part of the review process.

12. Automatic e-mail notifications

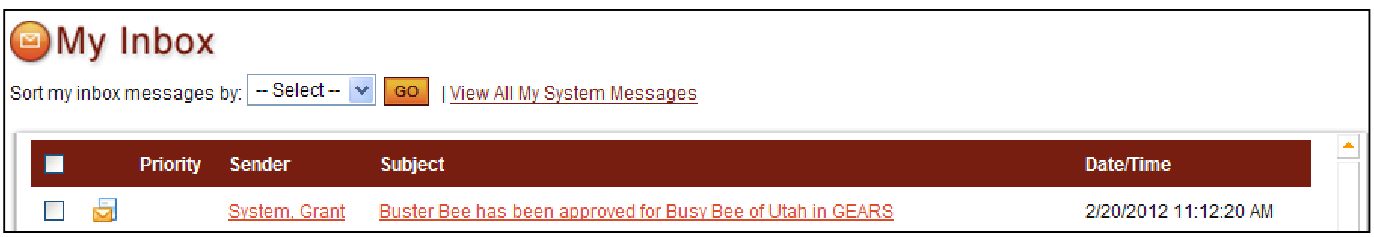
12.a. Automatic E-mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the submission of an application, an application being sent for modifications or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by UT GEARS personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from UT GEARS personnel. You can view or edit your System Messages by following these steps:



Click the "Open My Inbox" button under the "View My Inbox" section on the main menu. You will now see any unread system messages. You may filter system messages by choosing an option from the drop down labeled "Sort my inbox messages by."

a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:

(1) Click the "Reply" button to reply to the system message

(2) Click the "Close" button to close the system message

(3) Click the name of the sender to send an email to the sender of the message